DOCUMENT RESUME

ED 155 437 CE 016 948

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TITLE Performing Clerical Activities. Sales Clerk. Student Manual and Instructor's Manual.
INSTITUTION Clemson Univ., S.C. Vocational Education Media Center.
SPONS AGENCY South Carolina State Dept. of Education, Columbia. Office of Vocational Education.
PUB DATE 77
NOTE 21p.; For related documents see CE 014 491 and CE 016 911-989
AVAILABLE FROM Vocational Education Media Center, 10 Tillman Hall, Clemson University, Clemson, South Carolina 29631 ($160.00 for complete set, including nineteen filmstrips and eight overhead transparencies)

EDRS PRICE MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS Behavioral Objectives; Business Education; Business Skills; *Clerical Occupations; Instructional Materials; *Office Occupations Education; Performance Based Education; *Records (Forms); Salesmanship; *Sales Occupations
IDENTIFIERS Vocational Technical Education Consortium States

ABSTRACT

Supporting performance objective 44 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on taking sales orders in person are included in this packet. (The packet is the first in a set of three on performing clerical activities--CE 016 948-950.) The student materials include information on sales orders and preparing sales orders, two self-check quizzes with answer keys, a check-out activity, and a final checklist for the instructor's evaluation of activity performance. The instructor's manual includes instructions for duplicating necessary materials and for administering the packet activity. Also included are a sales-slip transparency and four sales-slip overlays. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the three packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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PERFORMING CLERICAL ACTIVITIES

SALES CLERK

STUDENT MANUAL

Prepared by

Maleeta M. Jones

These materials support
Performance Objective 44 of the
V-TECS Secretarial Catalog

State Department of Education
Office of Vocational Education
Office Occupations Education
Columbia, South Carolina 29201

In Cooperation With

Vocational Education Media Center
Clemson University
Clemson, South Carolina 29631

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CE 016 948

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TAKING SALES ORDERS IN PERSON

INTRODUCTION

Retailing is a vital part of the business world and offers a wide variety of jobs. The manner in which sales orders are handled may mean the difference between success or failure. As such, the sales clerk plays a major role in the selling industry.

DIRECTIONS

Before you start work on this unit, you should have completed learning activities related to the preparation of sales orders. If so, read the objective below. If you are able to perform this task, read the Check-Out Activities on page 8. Then arrange with your instructor to complete the Check-Out Activity:

or

If you need to complete learning activities in order to be able to complete the tasks, turn to page 2 and perform the learning activities in the order given.

OBJECTIVE

Given two situations in which you take sales orders in person, take and record two sales orders. Performance will be rated on the following criteria:

(1) Order must be accurate as to quantities, items, and prices.

(2) Manner displayed is courteous and pleasant as judged by the instructor.

LEARNING ACTIVITIES

1 READ Instruction Sheet I, SALES ORDERS.

OR

2 CHECK YOUR KNOWLEDGE by completing Student Self-Check I, TAKING A SALES ORDER IN PERSON.

3 READ Instruction Sheet II, PREPARING SALES ORDERS.

OR

4 COMPLETE Student Self-Check II, PROCESSING SALES ORDERS.

OR

5 ARRANGE with your instructor to complete this unit by completing the CHECK-OUT ACTIVITIES.

Instruction Sheet I

SALES ORDERS

A sales order is a form used to record a customer's request for merchandise.

There are two parts to a sales order:

(1) the address label, which contains the name and address of the customer

(2) the body, which gives detailed information about the quantity, description (may include stock no.), and price of the items being ordered. The body may include tax and the total amount of the sale.

The order form usually comes duplicate, and sometimes comes in triplicate, so that the customer, company, and sales department all have a record.
The general format for a sales slip or sales order is shown below:

REGAL STORES
5382 Rivers Avenue
North Charleston, SC

SOLD TO _____

ADDRESS _____

Clerk	Department	Amt. Rec.

QUAN.	DESCR.	UNIT PRICE	EXTEN-SION

Sales Order
REGAL STORES, INC.
5382 Rivers Avenue
North Charleston, SC 29406

TO _____ DATE _____ 19____

_____ ORDER NO. _____

_____ PHONE NO. _____

Quantity	Stock No.	Description	Unit Price	Extension

_____
Customer's Signature

Be sure to note in the above that variations may include space for a Purchase Order No. or space for your customer to sign the order.

Student Self-Check I

TAKING A SALES ORDER IN PERSON

(1) Number a plain sheet of paper from 1-10.

(2) Write TRUE or FALSE to the following statements.

(3) Compare your responses to the correct responses given.

STATEMENT

1. Sales orders should always be typed.
2. The customer is always right.
3. It is not necessary to verify data with the customer if you are sure you have the correct information.
4. The customer should sign the sales order.
5. One should always speak in a pleasant manner, even if a customer is rude.
6. The customer should wait for his order to be processed.
7. Sales orders should have the current date.
8. The ability to do arithmetic accurately is not important in preparing sales slips.
9. The copy of the sales slip given to the customer provides him with a record of the sale.
10. In some businesses, the sales clerk has to refer to a price list in order to find the selling price of an item.

Instruction Sheet II

PREPARING SALES ORDERS

The first step in preparing a sales order is to record the customer's name, address, and telephone number. This information is necessary in order to contact the customer upon arrival of the merchandise.

The current date is an essential part of the sales order because it calls attention to the time lapse between the order and delivery of items.

The initials of the clerk taking the order should go in the space designated. Also note the department to which the clerk is assigned. This information is needed so that if any question arises concerning the order, the clerk can be easily located.

Extensions are computed by multiplying the quantity times the unit price. All extensions are added to the sales tax (if applicable) to find the total due.

In processing the sales order, the store keeps a copy of all sales made for their records. The original is usually given to the customer.

Student Self-Check II

PREPARING SALES ORDERS

(1) Using the information below, complete the sales order form by supplying the appropriate information.

(2) Use the sales order form provided.

(3) Compare your completed copy with the correct form included.

SITUATION

You are employed as a sales clerk by Regal Stores, Inc., 5382 Rivers Avenue, North Charleston, South Carolina 29406. A regular customer, Mrs. Robert O. Adams of Awendaw, South Carolina, places the following order:

3 Silver Serving Trays at $15.49 each
1 Bubble Umbrella with blue trim at $4.00
6 Velour Bath Towels at $2.39 each
6 Velour Hand Towels at $1.39 each
6 Velour Face Cloths at $.99 each

Two complete sets in yellow, blue, and green are ordered.

Student Self-Check II Sales Order Form

REGAL STORES, INC.
5382 Rivers Avenue
North Charleston, SC 29406

"The store where you save!"

_____ 19 _____

SOLD TO _____

ADDRESS _____

_____

TELEPHONE NO. _____

CLERK	DEPARTMENT	AMOUNT RECEIVED

QUAN.	DESCRIPTION	UNIT PRICE	EXTENSION

SUBTOTAL

SALES TAX

TOTAL DUE

Positively no exchanges made unless this slip
is presented within 4 days after purchase!

CHECK-OUT ACTIVITY

You are employed by the Regal Catalog Store as a sales clerk. Usually you take orders over the telephone, but occasionally a customer comes into the office to place his order in person. Take two sales orders: one involving a student in your class and one given by your teacher.

Use forms provided.

As you perform the activity, your instructor will rate your performance using the Instructor's Final Checklist, Taking Sales Orders in Person.

CHECK–OUT ACTIVITIES

REGAL STORES, INC.
5382 Rivers Avenue
North Charleston, SC 29406

_____ 19____

SOLD TO _____

ADDRESS _____

_____

TELEPHONE NO. _____

CLERK	DEPARTMENT	AMOUNT RECEIVED

QUAN.	DESCRIPTION	UNIT PRICE	EXTENSION

SUBTOTAL	
SALES TAX	
TOTAL DUE	

Positively no exchanges made unless this slip is presented within 4 days after purchase!

KEY
STUDENT SELF-CHECK 1

(1) False
(2) False
(3) False
(4) False
(5) True
(6) False
(7) True
(8) False
(9) True
(10) True

KEY

STUDENT SELF-CHECK II

REGAL STORES, INC.
5382 Rivers Avenue
North Charleston, SC 29406

"The store where you save!"

Current date 19--

SOLD TO Mrs. Robert O. Adams

ADDRESS Awendaw
South Carolina

TELEPHONE NO. none

CLERK	DEPARTMENT	AMOUNT RECEIVED
MJ	Housewares	

QUAN.	DESCRIPTION	UNIT PRICE	EXTENSION
3	Silver Trays	15.49	46.47
1	Bubble Um.-blue	4.00	4.00
6	Velour B. Towels (2 each sea. ygl., bl., gn.)	2.39	14.34
6	Velour Hand Towels (2 each sea. ygl., bl., gn.)	1.39	8.34
6	Velour face cloths (2 each sea. ygl., bl., gn.)	.99	5.94
SUBTOTAL			79.09
SALES TAX	4%		3.16
TOTAL DUE			82.25

Positively no exchanges made unless this slip is presented within 4 days after purchase!

Student _____

Date _____

Instructor's Final Checklist

Check the student's performance in the following elements of Performing Clerical Activities – Sales Clerk.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

		Student Performance			
		Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1.	The student completed the sales orders with 100% accuracy	[ ]	[ ]	[ ]	[ ]
2.	The student spoke in a pleasant manner	[ ]	[ ]	[ ]	[ ]
3.	The student had forms handy, and completed them quickly and efficiently	[ ]	[ ]	[ ]	[ ]
4.	The student completed the forms legibly	[ ]	[ ]	[ ]	[ ]
5.	The student verified data by reading back to the customer	[ ]	[ ]	[ ]	[ ]
6.	The student computed extensions easily, and added sales tax (if applicable)	[ ]	[ ]	[ ]	[ ]
7.	The student processed the order through proper channel	[ ]	[ ]	[ ]	[ ]

PERFORMING CLERICAL ACTIVITIES

SALES CLERK

INSTRUCTOR'S MANUAL

Prepared by

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TEACHER'S INSTRUCTIONS

Perishable items that you will need to duplicate are the sales order forms for Student Self-Check II (page 7 – one form for each student) and Check Out Activity (page 9 – two forms for each student). You will also need to duplicate enough copies of the Instructor's Final Checklist (page 12) for evaluation of each student.

For the Check Out Activity, make up orders for your students using any catalog you have handy. A sales order transparency with four overlays is included with this unit.

SALES SLIP TRANSPARENCY

REGAL STORES, INC.
5382 Rivers Avenue
North Charleston, SC 29406

"The store where you save."

_____ 19_____

SOLD TO_____

ADDRESS_____

_____

TELEPHONE NO._____

Clerk	Department	Amount Received	
QUAN.	DESCRIPTION	UNIT PRICE	EXTENSION
SUBTOTAL			
SALES TAX			
TOTAL DUE			

Positively no exchanges made unless this slip is presented within 4 days after purchase!

SALES SLIP OVERLAY #1

The dateline is always the current date.

DATELINE

Customer information — you may be required to ask for some form of identification if payment is being made by check or charge card.

Customer's Name

Customer's Street and No.

Customer's City, State and Zip Code

Customer's Telephone No.

SALES SLIP OVERLAY #2

Quantity ——the total number of each item sold.

Description——the kind of item sold. For example, "Typing paper"

Unit price—— the price of the item.

Extension—— the answer you get by multiplying the quantity by the unit price of each item. For example, 4 reams of typing paper at $5 each equals $20.

Subtotal——total found by adding all extension figures.

Total Due—— found by adding subtotal and sales tax.

Sales tax—— amounts vary according to state. Use the percentage your state charges.

SALES SLIP OVERLAY #3

April 29

Mrs. Roger B. Adams

4556 Gray Lane

Summerville, SC 29410

873-9447

MJ	Linen	$28.30	
2	"Queen" Sheets	6.50	13.00
1	Pillowcase Set	4.00	4.00
2	Blue Towels	2.99	5.98
2	Wash Cloths	.99	1.98
2	Pot Holders	.75	1.50
1	Apron	.75	.75
			$27.21
	4%		1.09
			$28.30

SALES SLIP OVERLAY #4